6 October 2025

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,894.3	58.0	0.23%
BSE Sensex	81,207.2	223.9	0.28%
GIFT Nifty*	24,960.5	-9.5	-0.04%
Dow Jones	46,758.28	238.56	0.51%
S&P 500	6,715.79	0.44	0.01%
NASDAQ	22,780.51	-63.54	-0.28%
FTSE 100	9,491.25	63.52	0.67%
CAC 40	8,081.54	24.91	0.31%
DAX	24,378.8	-43.8	-0.18%
Shanghai**	3,882.8	+20.25	+0.52%
Nikkei 225*	47,830.51	2061.01	4.5%
Hang Seng*	26,910.5	-230.4	-0.85%

As at 8.00 am
***** Market Holiday***

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	61.8	1.1	1.78%
Oil (Brent)	65.5	1.1	1.72%
Gold	3,922.1	35.3	0.91%
Silver	48.4	0.4	0.73%
Copper	10,455.0	192.0	1.87%
Cotton	0.64	-0.01	-0.95%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	0.24
USD/INR	88.78	0.08	0.08
GBP/INR	119.45	-0.28	-0.23
EUR/INR	104.21	0.12	0.11
DXY Index	98.02	0.17	0.00

VIX	Value	Change (Pts)	Change (%)
India VIX	10.06	-0.23	-2.24%
S&P 500 VIXApr 24	16.65	0.02	0.12%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.515	-0.015
US 10-Year Yield	4.086	-0.068

Market Updates

The markets are expected to open marginally lower today as trends in GIFT NIFTY indicate a negative start for the broader index after NIFTY closed 58 points higher at 24,894 on Friday.

Black Box
The company partnered with Wind River to accelerate global edge and cloud solutions, securing India and Middle East markets with expected revenue of ₹1,350 crore.

Bondada Engineering
The company received Bank of Baroda sanction enhancing credit facilities from ₹50 crore to ₹125 crore to support working capital requirements.

Ceigall India
The company received ₹1,309 crore LOAs from MSEDCL to develop 147 MW and 190 MW solar power projects across six Maharashtra districts under MSKVY 2.0.

Emcure Pharmaceuticals
The company completed acquisition of 40.95 lakh shares in Zuventus Healthcare for ₹724.9 crore, making Zuventus a wholly owned subsidiary.

Goodluck India
The company's subsidiary Goodluck Defence received license for manufacturing artillery shells with initial 150,000 annual capacity, commencing trial production in Q3FY26, and joined AMCA programme.

IEX
The company reported September electricity volume of 11,065 MU, up 7.1% YoY, with RTM up 22.3% YoY, Green Market up 50% YoY, DAM price down 14.5% YoY to ₹3.58/unit, and RTM price down 16.8% YoY to ₹3.31/unit.

JSW Energy
The company successfully commissioned 114 MW renewable capacity with 21 MW solar and 93 MW wind, raising total installed capacity to 13,211 MW.

Larsen & Toubro
The company secured major orders for a 5.9 million sq. ft IT park in Bengaluru and mixed-use development in Mumbai.

Lupin
The company launched Liraglutide Injection, a bioequivalent of Victoza, in the U.S. to improve glycemic control, targeting a $350 million market.

Patanjali Foods
The company signed a non-binding MOU with MoFPI for potential investment up to ₹1,000 crore, subject to approvals and project evaluations.

Paras Defence and Space Technologies
The company's subsidiary Paras Anti-Drone Technologies received a ₹46.19 crore order from the Ministry of Defence for Anti-Drone Systems.

TVS Motor
The company's subsidiary TVS Motor Singapore completed acquiring 100% stake in Engines Engineering S.p.A, making it a wholly owned subsidiary.

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